Agency internal prospecting campaign worksheet

Use this worksheet for your agency/operator team's own internal prospecting. It helps you prepare a list order and judge whether the delivered records support the task. It is not a client workspace, raw-list resale agreement or promise of meetings.

Campaign name: _____ Owner: _____

Review date: _____ Next decision date: _____

Define the job before choosing a list

Our offer: _____

The people and companies it could help: _____

Required fit evidence: _____

Exclusions and suppression rules in our own workflow: _____

The next action after inspection: _____

Choose the service that fits the input you already have:

[ ] Targeted Search: a supported professional search reference and quantity; each search requires at least 1,000 leads. Review the price before payment.

[ ] Company Followers: a supported company page reference. Count evidence determines the price review; followers are potential prospects.

[ ] Filtered Followers: a company reference plus supported filter/search criteria. Request and review the owner-issued quote before funding.

Prepared sources can go straight to New order. Optional company discovery is useful when you need source ideas; it is not a required first step.

Record the scope privately

Keep exact source/filter references in your private working copy and the order. Do not paste them into public posts, video frames, campaign tags or the public placement log. No contact-list or CRM upload is needed for these order inputs.

Source label	Service	Private reference location	Quantity or count status	Scope checked on
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Before confirming:

[ ] The correct active workspace, service and source items are shown.

[ ] The quantity, price, minimum cash rule, credits used/remaining and cash due are understood.

[ ] Any missing count or changed price is resolved through the actual review flow.

[ ] The person authorizing cash/package funding is the workspace owner.

[ ] Team access is appropriate: members can access workspace work/files and spend shared credits. There are no employee spend limits or per-client partitions in this worksheet or product.

Inspect the delivered file

Order reference in our private records: _____

Published file/version: _____ Retrieved on: _____

Source/count observation date, if available: _____

The retrieval date is not a claim that every record was refreshed on that date. Use the field guide to distinguish record context from optional contact enrichment.

Check	Our observation	Next action
Accepted sources/items match delivery	_____	_____
Record count and distinct-record check	_____	_____
Role/company/location fit in inspected records	_____	_____
Required contact fields present or absent	_____	_____
Existing contacts/duplicates suppressed in our own tools	_____	_____
Shortfall, unclear field or discrepancy	_____	Ask support with the order reference

Write the inspected number beside any finding. An inspection of 20 rows is an observation about those 20 rows; it is not a guarantee for the whole list. Do not equate a populated email with a verified or permitted contact.

Fictional format exercise: Sam Rivera's sample row lists Founder, Demo Co. and Austin, United States, with blank emails, phone, domain and company ID. A role may fit an offer hypothesis while the contact path and company fit still require research. Mark these fields unknown; do not invent them. The public sample is not a deliverable from this campaign.

Decide what to do next

[ ] Proceed with the records that meet our evidence requirements.

[ ] Research uncertain records before considering outreach.

[ ] Pause and ask support about an order/delivery discrepancy.

[ ] Do not reorder yet; the task, fit or use rights remain unclear.

Useful records among inspected records: _____ / _____ Basis: _____

Time spent preparing/inspecting: _____ minutes Observed downstream result: _____

What would justify another order, and when? _____

Any repeat order needs a fresh scope and price review. Additional/replacement files on the same order are not a new purchase. Keep raw files within the current permitted internal use; resolve client-handoff or redistribution needs with Followingg before adopting that workflow.